

Stanford University Human Resources

Change Communications

I was brought aboard the University Human Resources communications team on a fixed-term contract to reinvigorate the benefits communications program after the surprise resignation of a benefits communications manager. I established substantive working relationships with the entire benefits team and delivered complex print and digital communications, on time, on budget, and of the highest quality.

I was then given the responsibility of restoring the waning Health Care Consumer Education Initiative. I connected the dots between the national health care dilemma, Stanford University's goal of bending the health care cost curve, and the move by employers across America to health care consumerism. I worked with the benefits leadership team to rebuild, refocus, and reenergize the educational outreach campaign, including my successful efforts to break through an impasse and gain acceptance of the Educated Choices brand and messaging platform, as well as strategically partnering with the health and welfare leadership team to fine tune the health care consumerism and wellness messaging outreach programs in order to encourage employee involvement in controlling the risk factors and behavioral causes of disease.

In addition, I created the social media brand strategy and roadmap, including associated social media marketing tactics and performance metrics, for University Human Resources, establishing and cultivating critical relationships across the university to ensure the success of our Twitter and Facebook channels, which depended upon a steady flow of relevant, engaging, employee-facing content.

REFUSE LIMITS

RESIST ASSUMPTIONS

REALIZE EXCELLENCE



Changing the world is our legacy.

For more than 120 years, our academic, research and patient care programs have defied traditional paradigms and set new standards of innovation across the globe. If you're an independent thinker who shares our drive to challenge limitations, push boundaries and fuel progress, come change the world with us.

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Stanford University has changed the world, over and over again. Now, let us change yours.

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STANFORD UNIVERSITY

Stanford University is an affirmative action, equal opportunity employer.



EXECUTIVE SUMMARY

BACKGROUND

The Health Care Consumer Education Initiative is one element among many that make up the three-year (2012-14) strategic plan for University Human Resources. According to the strategic plan, the initiative is “an educational campaign to provide information and tools so that employees can make informed decisions about their care.” The multiyear initiative, sponsored by Les Schlaegel, associate vice president of Benefits at Stanford University, explicates the “deal” between employee and employer, preparing Stanford’s health care plan participants for their role in helping to bend the health care cost curve.

COMMUNICATIONS OBJECTIVE AND STRATEGIES

Our communications objective is to support the university’s efforts to control health care costs. We will accomplish our objective by:

Crafting targeted, action-oriented communications that address what we want our target audiences to think, feel, and do after they are exposed to our message platforms, answering the most fundamental of questions: What’s in it for me?

Our communications end in mind—the best possible outcome for the initiative—is the educated Stanford health care plan participant, the person who makes more active, thoughtful, judicious choices when accessing health care program services. The following individual competency measures will be used to determine our success in persuading our employees. The educated employee will have:

- A better understanding of and appreciation for the complete range of benefits available to him or her.
- The tools to make educated lifestyle choices and health care purchase decisions.

MESSAGING

What is our unique value proposition?

Stanford University is a community that cares. Our primary concern is with the health and welfare of our employees. To that end, the university offers an expansive range of resources to help enhance the standard of living of our employees, with benefits including: employee and dependent medical, prescription, vision, and dental care plans; retirement plans; group term life and long term care insurance plans; wellness programs; daycare services; work-life programs; transportation benefits; tuition reimbursement; and incomparable campus programs and facilities.

In alignment with BeWell and HIP, we will employ a consumer education framework organized around the life events of our employees and retirees that makes assessing health and wellness information and resources easy and intuitive.

DELIVERABLES

An integrated deliverables program will be used to achieve our goal of the educated plan participant. The strong brand strategy under development will put us in control of how our health-and-welfare program is perceived by employees. Our brand position and personality attributes—our specific promise of performance, as well as the visual, spoken, and written elements—will play out in a cascading series of communications to Stanford leadership, health care plan participants, our partners (i.e., colleagues and vendors), and key influencers.

KEY MESSAGES

STANFORD AS A RESPONSIBLE AND CARING EMPLOYER

- Our employees are our priority. Stanford University wouldn't be the premier learning institution that it is without your work and support. We take pride in providing you with the benefits, programs and services you need to keep yourself and your family healthy and happy.
- Stanford will continue to examine its benefits offerings and make changes to its health plans in order to slow the pace of rising health care costs, comply with any changes mandated by health care reform legislation, and align our health plans with the university's health care strategy.
- Health care reform legislation is creating a number of new regulations, requirements and fees—one of which is a special excise tax on certain health benefits plans. If our health care costs continue to rise at the same rate they have in the past, Stanford would be liable for this multi-million dollar excise tax penalty. Unfortunately, the full excise tax burden would fall directly on our plan participants and would significantly increase all participants' health care costs. This is yet one more reason why we need to contain our health care costs in the years to come.
- The university is exploring changes to our health care plans over the next few years to help us thoughtfully manage health care cost increases and prevent us from having to pay an expensive special excise tax.
 - One of our initial steps in this process was to begin offering a self-insured Exclusive Provider Organization (EPO) medical plan in 2012. The EPO is one step toward managing costs. In the future, we will be exploring ways to refine our benefits offerings to match the new post-health care reform legislation landscape and encourage our employees to take a more active role in managing their care.

INDIVIDUAL RESPONSIBILITY

- To remain an employer of choice and provide for your health and well-being, Stanford University offers a complete benefits package that includes a wide range of programs and resources to help you manage your unique personal and professional needs.
 - We encourage you to learn how the programs can help you at various stages of your life so you can take advantage of them when you need them.
- When you know about all of the benefits, programs and services that Stanford offers, you have the power to make educated choices that can positively or negatively impact your health, your finances, your family and your community.

- Each of us directly contributes to the university's overall costs for health care, but we all also have the power to positively influence costs by taking a more thoughtful, informed approach when using health care.

OUR PARTNERSHIP

- Stanford University is committed to providing you with the benefits that promote your health and well-being as part of your total rewards package, but it is your responsibility to select the plan that is right for you and your eligible dependents.
- Stanford and its employees work together as partners to share the cost of health care. Although Stanford pays a significant portion of employees' health care costs, it is the responsibility of each employee to make smart health care decisions and healthy, educated lifestyle choices to help keep health care costs to a minimum.
- Everyone has different health care needs at various stages of their lives. Because we care deeply about our employees, Stanford is committed to supporting your changing needs—whether you are in good health and practicing routine prevention, are in need of major assistance, or your health is somewhere in between. But it is up to you to use your benefits wisely and make thoughtful decisions about how and when you receive care.
- Health care costs are rising rapidly. Stanford is committed to offering a variety of health plans options that have equitable features and help control escalating costs by encouraging competition among vendors. You can be proactive in helping us keep costs down, too. By understanding the true costs of care and taking an active part in managing your health, you can help keep your health care costs to a minimum.
- As a community of people working together, we have the unique opportunity to support one another in the pursuit of better health. When you learn about the wide array of benefits, programs and services that Stanford offers, and make educated choices about how to wisely use these benefits to support your and your family's health, everyone benefits.
- By taking steps to achieve your best health and be an educated health care consumer, you and the university will share in the short- and longer-term savings.
 - In the short term, you save money when you choose the most appropriate and cost-effective care.
 - In the longer term, you save because employee-paid premiums are directly tied to the university's overall employee health care expenses, and the university's ability to meet health care reform regulations and requirements without incurring costly fees.

July 19, 2012



Health Care Consumer Education Initiative

What It Is and What It Means for Stanford Faculty and Staff

Les Schlaegel, AVP, Stanford Benefits
Neal Evans, Director, Health and Welfare Benefits
October 19, 2012

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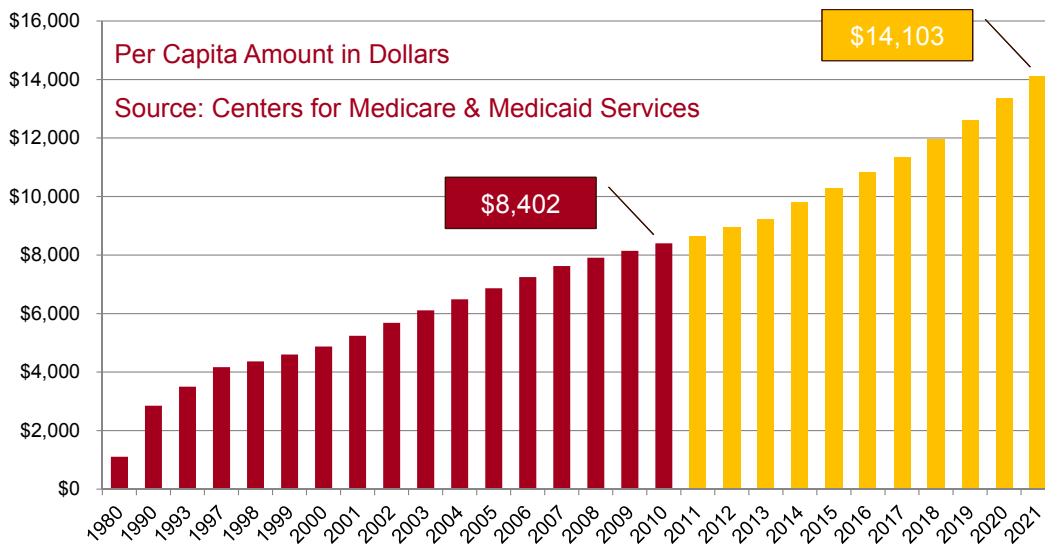
Webinar Agenda

- The State of Health Care in America
- What Is the Health Care Consumer Education Initiative?
- What Does the Initiative Mean to Faculty and Staff?
- What Actions Are Planned for the Initiative?

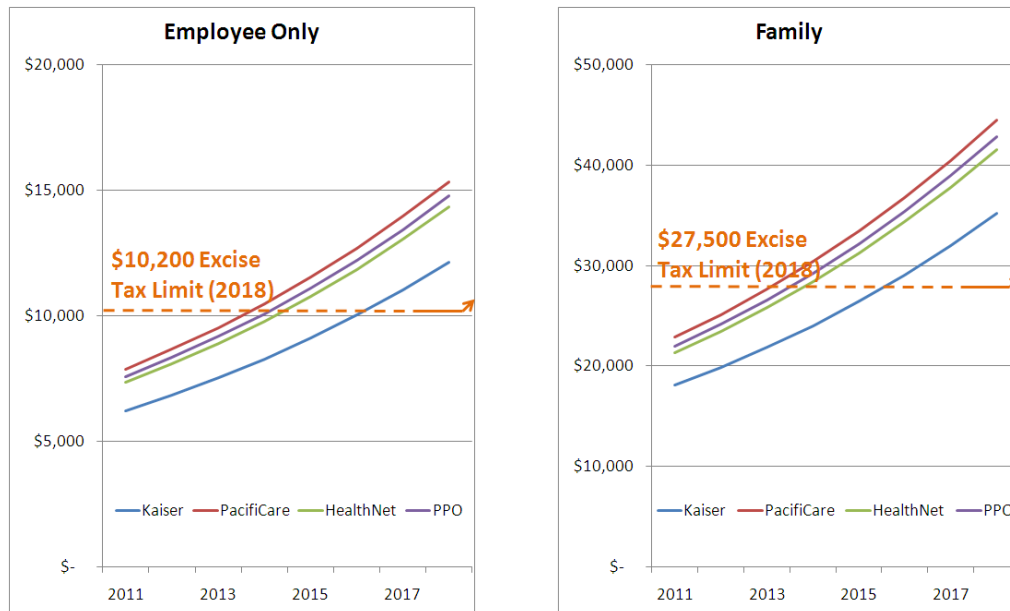
The State of Health Care in America



National Health Expenditures, Per Person Per Year (1980-2021)



Projected Annual Total Healthcare Premium



Why Costs Are Spiraling

- Inefficiencies
- Hidden costs
- Personal health
- New and emerging therapies

The Crippling Impact on Our Economy and on Individuals

- Harder to pay household expenses
- Challenging to pay for college
- Difficult to save for retirement
- Tougher for businesses to hire new employees

How Are Employers across America Dealing with the Rising Cost of Health Care?

- Some employers are eliminating coverage.
- Some employers are consolidating their health care plans.
- Some employers are replacing or complementing their traditional health benefits plans with consumer-driven health care:
 - › High-deductible plans
 - › Health savings accounts (HSAs)
 - › Health reimbursement accounts (HRAs)
- Some employers are awaiting movement in the market as a result of the Patient Protection and Affordable Care Act (PPACA):
 - › Pay or play

What Is the Health Care
Consumer Education
Initiative?



What Is the Health Care Consumer Education Initiative?

- The Health Care Consumer Education Initiative is a multiyear strategy that prepares Stanford's faculty and staff for their roles in helping to bend the health care cost curve by being better health care consumers by providing:
 - › Reliable information so that they are able to understand how lifestyle changes can benefit them
 - › Tools and programs to help them be their healthiest

Why Have We Undertaken the Initiative?

- Stanford University is a community that cares. One of our primary concerns is with the health and welfare of our employees, which is demonstrated by an expansive range of resources to enhance the standard of living of our employees.

What Does the Initiative
Mean to Faculty and
Staff?



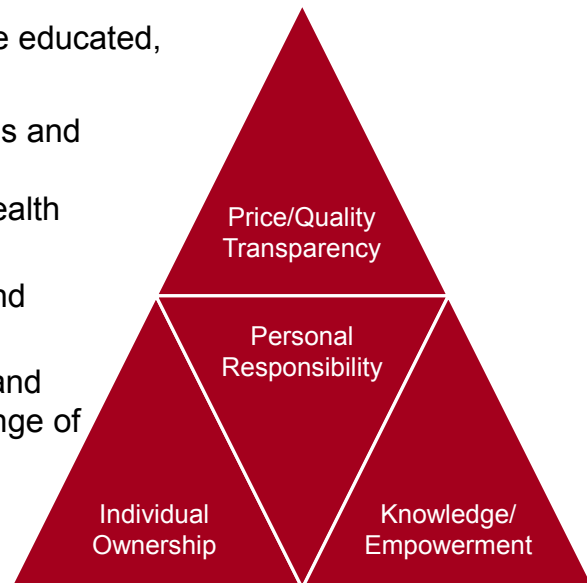
What Are the Elements of the Initiative?

- Wellness, prevention, and early intervention programs
- Disease management and case management programs
- Information and decision-support tools
- Incentive reward programs
- Personal accounts (FSAs, HSAs, HRAs)

Our Desired Outcome: The Educated Employee

The goal of the initiative is to create educated, informed employees who:

- Regularly examine available tools and information to make thoughtful, prudent choices when making health care purchase decisions
- Take ownership in their health and wellbeing
- Have a better understanding of and appreciation for the complete range of benefits available to him or her
- Share responsibility in managing costs



Shared Responsibility

- Stanford University is committed to providing our employees with benefits that promote health and well being, as part of our total rewards package.
- It is the responsibility of employees to select the benefits that are right for them and their eligible dependents—and to use their benefits wisely and make thoughtful decisions about how and when you access care.
- Stanford University and our employees work together as partners to share the cost of health care:
 - › Employees have the purchasing and decision-making power in their hands to make smart health care decisions when accessing care and informed, educated lifestyle choices to keep health care costs at a minimum.
 - › Stanford is committed to supplying the information and decision support tools that employees need, along with financial incentives, rewards, and other benefits that encourage personal involvement in altering health and health care purchasing decisions.

What Actions Are
Planned for the
Initiative?



The Health Care Industry Environment

Even as employers have tried to encourage their employees to compare quality and cost among hospitals, physicians, and other providers, some health systems (most notably, Sutter Health) have put gag clauses in their contracts with health plans that preclude the plans from releasing cost information.

Examples of Deliverables

- Benefits website content
- Cost-comparison tools
- Direct mail postcards
- Employee testimonials
- Direct mail Open Enrollment newsletters
- Personal counseling for faculty
- Social media
- *Stanford Employee Insider*
- *Stanford Report*
- Surveys and focus groups
- Town hall health-and-wellness briefings

Health Care Consumer Education Initiative Campaign Brand

Educated Choices

BeHealthy. BeActive. BeInformed.

Stanford University urges you to be your healthiest and happiest every day of the week.

Take care of your body, eat a healthy, well-balanced diet, and stay fit.

Healthy living means making informed choices. We're here to help with an expanding list of tools and information.

Metrics: How Will We Determine If We've Been Successful?

An educated consumer will have specific competencies. We will use tools to measure these competencies at various points during and at the end of the campaign. These tools will include:

- Tracking clickthroughs on webpages and articles
- Participation in Twitter and other social media
- Surveys and focus groups
- Participation in the BeWell program
- Health plan enrollment migration
- Health plan claims data

Advocacy through Pacific Business Group on Health (PBGH)



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The **Pacific Business Group on Health (PBGH)** has helped purchasers nationwide improve the quality of health care and moderate health care cost increases. PBGH serves as a voice for purchasers, leveraging the strength of its 60 member companies, who provide health care coverage to 10 million Americans and their dependents.

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PBGH's David Hopkins and other experts examine strategies to improve maternity care in

Our Strategies

PBGH has four key strategies to help it achieve its vision.

Thank You! Questions?

This presentation and webinar will be posted on the University Human Resources projects page: hrweb.stanford.edu/projects.



Health Care Consumer Education Initiative

Communications Plan for Consumer Messaging

Neal Evans and Peter Speliopoulos
Monthly Managers' Meeting
November 26, 2012

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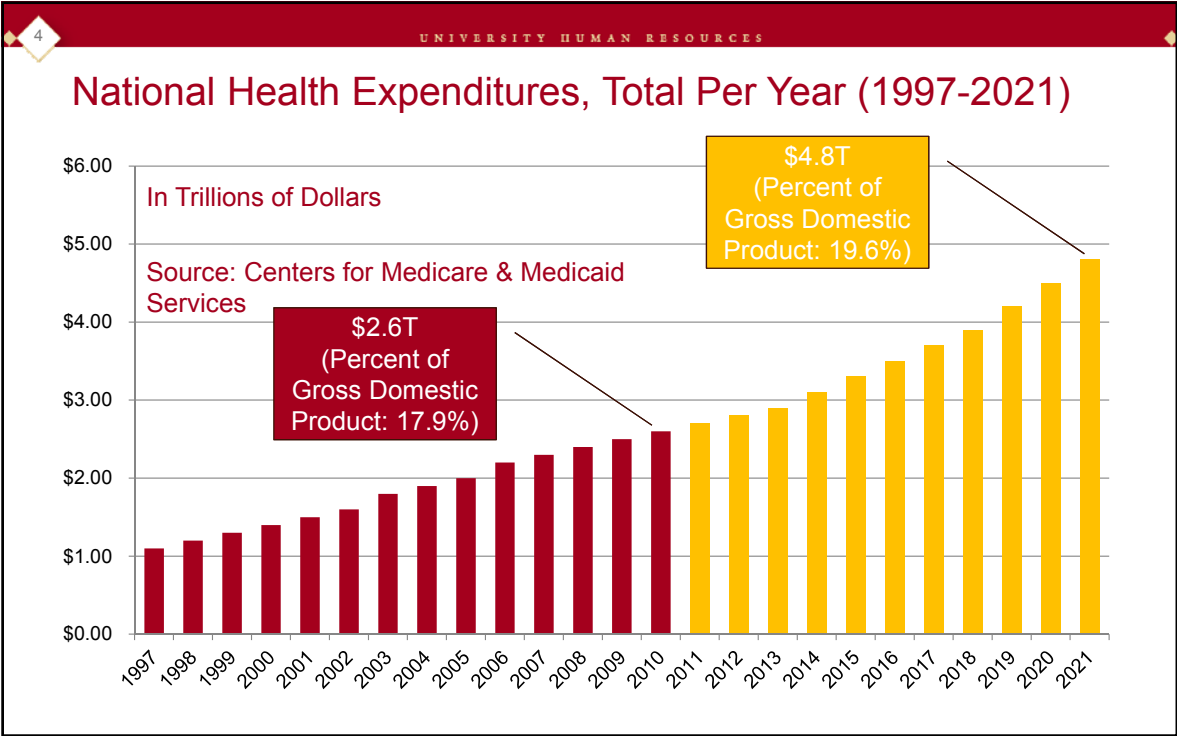
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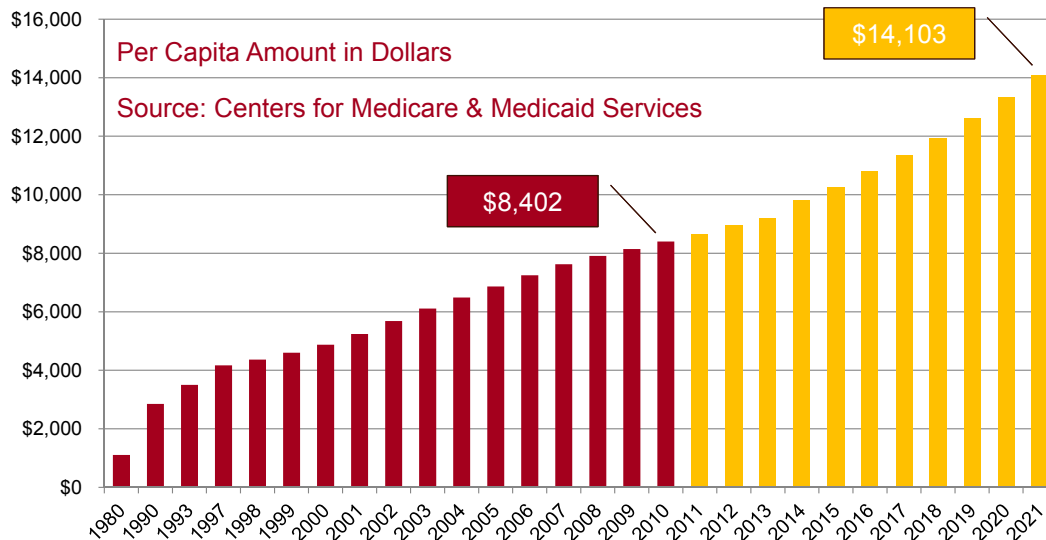
Agenda

- The State of Health Care in America
- What Is the Health Care Consumer Education Initiative?
- Communications Challenges
- Communications Plan

The State of Health Care in America



National Health Expenditures, Per Person Per Year (1980-2021)



How Are Employers across America Dealing with the Rising Cost of Health Care?

- Some employers are eliminating coverage.
- Some employers are consolidating their health care plans.
- Some employers are replacing or complementing their traditional health benefits plans with consumer-driven health care:
 - › High-deductible plans
 - › Health savings accounts (HSAs)
 - › Health reimbursement accounts (HRAs)
- Some employers are awaiting movement in the market as a result of the Patient Protection and Affordable Care Act (PPACA):
 - › Pay or play

What Are the Elements of Health Care Consumerism?

- Wellness, prevention, and early intervention programs
- Disease management and case management programs
- Information and decision-support tools
- Incentive reward programs
- Personal accounts (FSAs, HSAs, HRAs)

What Is the Health Care Consumer
Education Initiative?

What Is the Health Care Consumer Education Initiative?

- A strategic campaign initiated in FY2012 by University Human Resources to provide employees with (1) reliable information so that they are able to understand how lifestyle changes can benefit them and (2) tools and programs to help them be their healthiest
- Explains “the deal” between employee and employer to prepare Stanford’s health care participants for their role in helping to bend the health care cost curve

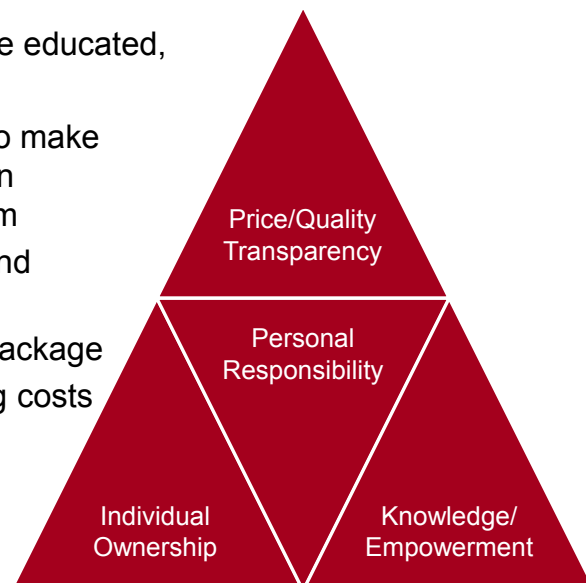
Why Have We Undertaken the Health Care Initiative?

- Stanford University is a community that cares. One of our primary concerns is with the health and welfare of our employees, which is demonstrated by an expansive range of resources to enhance the standard of living of our employees.

What Is the Goal of the Initiative?


The goal of the initiative is to create educated, informed employees who:

- Examine tools and information to make thoughtful, prudent choices when accessing the health care system
- Take ownership in their health and wellbeing
- Understand their total benefits package
- Share responsibility in managing costs




Communications Challenges

The Challenge in Introducing Health Care Consumerism



Employers tend to view wellness and consumerism as ways to solve the cost problem.



Employees tend to view wellness and consumerism as buzzwords for cost-shifting.

Digging Deeper into the Challenges of Health Care Consumerism

The Individual

People, by nature, have difficulty changing unhealthy behaviors and lifestyles.

The Industry Environment

Even as employers have tried to encourage their employees to compare quality and cost among hospitals, physicians, and other providers, some health systems (most notably, Sutter Health) have put gag clauses in their contracts with health plans that preclude the plans from releasing cost information.

The Reality at Stanford

We need to continue strengthening our communications outreach so that employees have at their disposal the data and tools they need to evaluate health care costs, opportunities for savings, and the quality of providers.

Communications Plan

Our Communications Strategy

To craft targeted, action-oriented communications that address what we want our target audiences to think, feel, and do after they are exposed to our message platforms, answering the most fundamental of questions:
What's in it for me?

Our Desired Outcome: The Educated Employee

The Educated Employee will have:

- A better understanding of and appreciation for the complete range of benefits available to him or her
- The tools to make educated lifestyle choices and health care purchase decisions

Turning the Corner

Soft launch: Open Enrollment 2012

Purpose: To set the stage by introducing key consumer messages into communications materials, including print, web, and digital

Hard launch: Open Enrollment 2013

Purpose: To begin a visible, branded communications campaign that expressly introduced consumer messaging into all benefits communications



Audiences

- Benefits-eligible employees
- Administration and faculty leaders
- Partners (e.g., BeWell, Faculty and Staff Help Center, HIP, SCC, Stanford Benefits call center, Blue Shield of California, and Kaiser Permanente)
- Key influencers (e.g., HRMs, FAOs, business managers, DFAs, managers, administrative staff)

Key Messages

- Stanford University is committed to providing our employees with benefits that promote health and well being, as part of our total rewards package.
- It is the responsibility of employees to select the benefits that are right for them and their eligible dependents—and to use their benefits wisely and make thoughtful decisions about how and when you access care.
- Stanford University and our employees work together as partners to share the cost of health care:
 - › Employees have the purchasing and decision-making power in their hands to make smart health care decisions when accessing care and informed, educated lifestyle choices to keep health care costs at a minimum.
 - › Stanford is committed to supplying the information and decision support tools that employees need, along with financial incentives, rewards, and other benefits that encourage personal involvement in altering health and health care purchasing decisions.

Examples of Near-Term Actions and Deliverables

- Benefits website content
- Benefits website redesign
- Briefings:
 - › Leadership (Randy Livingston, David Jones, CFSHR, Deans, Faculty Senate, President's staff, UMG)
 - › Milestone updates (Working Group)
 - › Stakeholders (DFAs, FAOs, HRMs)
- Cost-comparison tools
- Direct mail postcards
- Employee testimonials
- Direct mail Open Enrollment newsletters
- Personal counseling for faculty
- Social media
- *Stanford Employee Insider*
- *Stanford Report*
- Surveys and focus groups
- Town hall health-and-wellness briefings

Health Care Consumer Education Initiative Campaign Brand

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Stanford University urges you to be your healthiest and happiest every day of the week.

Stay fit, take care of your body, and eat a healthy, well-balanced diet.

Healthy living means making informed choices. We're here to help with an expanding list of resources.

Metrics: How Will We Determine If We've Been Successful?

An educated consumer will have specific competencies. We will use tools to measure these competencies at various points during and at the end of the campaign. These tools will include:

- Tracking clickthroughs on webpages and articles
- Participation in Twitter and other social media
- Surveys and focus groups
- Participation in the BeWell program
- Health plan enrollment migration
- Health plan claims data

Thank You! Questions?



Health Care Consumer Education Initiative

An Update on the Communications Campaign

Peter P. Speliopoulos
Monthly Management Meeting
January 28, 2013

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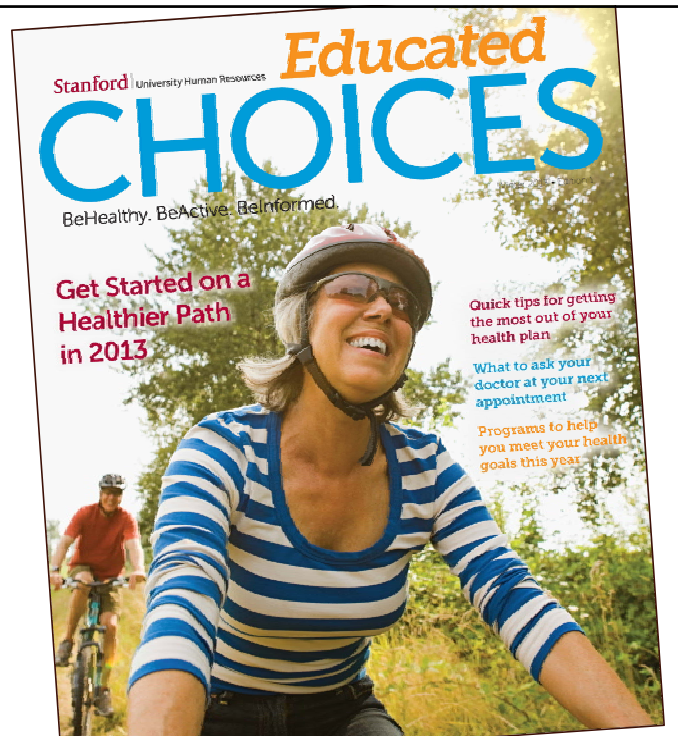
Turning the Corner

Soft launch: Open Enrollment 2011
Purpose: To set the stage by introducing key consumer health care messages into communications materials, including print, web, and digital

Hard launch: Open Enrollment 2012
Purpose: To begin a visible, branded communications campaign that expressly introduces consumer messaging into all benefits communications



The quarterly, hardcopy *Educated Choices* magazine was born from the mission of the Health Care Consumer Education Initiative, which is an educational program that provides resources and tools that empower employees so they are able to make educated choices about their own health care.



Our Desired Outcome:
The Educated Employee

Educated Choices
BeHealthy. BeActive. BeInformed.



1

Educated employees gain recognition and acceptance of our wellness brand and programs and, over time, readily seek out and make use of our Stanford wellness initiatives.



2

Educated employees examine available tools and resources to make thoughtful, prudent choices when accessing the health care system. We're providing more tools and resources than ever before and even more are on the way.



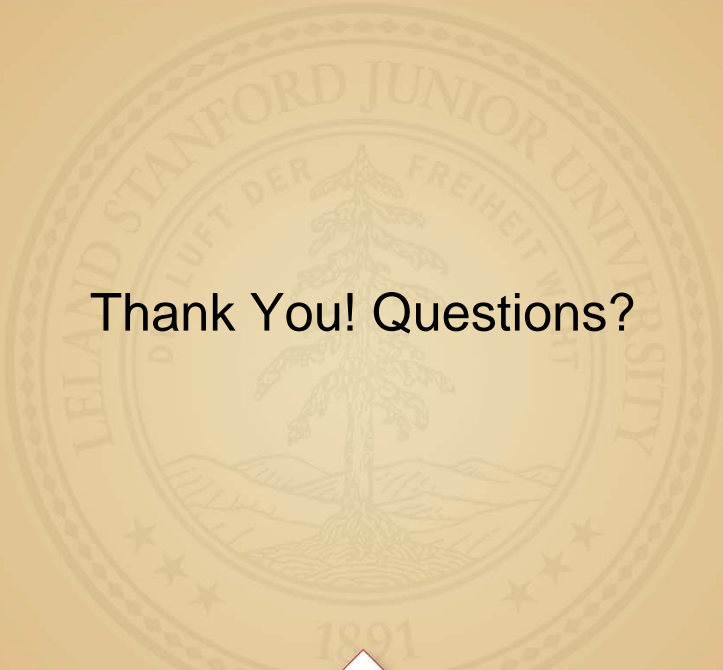
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Employees have a role to play. Stanford has always been committed to helping our employees achieve their optimal health. We're in this together. Stanford needs the help of employees to manage rising health care costs.



Measuring Success

- Tracking clickthroughs on webpages and articles
- Participation in Facebook, Twitter, and other social media
- Surveys and focus groups
- Participation in the BeWell and SCC programs
- Health plan enrollment migration
- Health plan claims data



Thank You! Questions?

UNIVERSITY HUMAN RESOURCES



Health Care Consumer Messaging Plan

Guiding Principles

- Utilize all appropriate communication media, vehicles, and channels to drive clarity and relevance among employees about issues of health, wellness, consumerism, and condition management.
- Leverage and align with partner messaging themes.
- Mobilize and sustain the process of strategic change communications balanced by the knowledge that pushing for immediate changes to adapt to a changing environment can increase psychological burdens that can quickly become overwhelming.
- Provide a methodical introduction to health care consumerism, enabling employees to digest information in smaller, more manageable doses.
- Do not stop at presenting facts. Also give readers the information they need to make decisions and where they may go to get their questions answered.

Goals

- Providing our employees with appropriate tools and reliable information to help them make educated decisions regarding their benefits in order to create an environment of ownership, appreciation, and shared responsibility.
- Move with deliberation from the soft-launch phase of the campaign to the hard-launch phase, a visible, branded communications campaign that expressly introduces consumer messaging into all benefits communications.
- The "Educated Employee," who will have:
 - A better understanding of and appreciation for the complete range of benefits available to him or her as a Stanford employee
 - The tools to make educated lifestyle choices and health care purchase decisions

Messages

- Stanford University is committed to providing our employees with benefits that promote health and well being, as part of our total rewards package.
- It is the responsibility of employees to select the benefits that are right for them and their eligible dependents—and to use their benefits wisely and make thoughtful decisions about how and when you access care.
- Stanford University and our employees work together as partners to share the cost of health care:
 - Employees have the purchasing and decision-making power in their hands to make smart health care decisions when accessing care and informed, educated lifestyle choices to keep health care costs at a minimum.
 - Stanford is committed to supplying the information and decision support tools that employees need, along with financial incentives, rewards, and other benefits that encourage personal involvement in altering health and health care purchasing decisions.

Vehicles and Channels	Feb. 2013	Mar. 2013	Apr. 2013	May 2013	Jun. 2013	
Stanford Partner Themes: • BeWell/HIP • Faculty and Staff Help Center • SCC • SLAC • WorkLife	BeWell: Heart Health	BeWell: Nutrition	BeWell: Environment	BeWell: Cancer Prevention	BeWell: Men's Health	
	Help Center: Relationships (Feb.); Communicating with Tact (Feb., Mar.); Men's Issues (Mar.); Boundaries In Codependent Relationships (Mar.); Grief (Mar., Apr.); Codependency (Mar., Apr., May, Jun.)					
	WorkLife: Resources and Referral		WorkLife: Childcare			
Benefits Website		Benefits Feature of the Month (with yes/no feedback form): Nutrition	Benefits Feature of the Month (with yes/no feedback form): Environment	Whiteboard Video: Featuring Stanford's benefits and wellness programs	Benefits Feature of the Month (with yes/no feedback form): Cancer prevention	Benefits Feature of the Month (with yes/no feedback form): Men's health
UHR Website	Rotating banners to display Educated Choices themes, Newsroom, surveys, etc.					
Educated Choices Magazine	Focus: Getting started on a healthier 2013			Focus: Stanford Health Care 101, covering health care fundamentals and what employees can do to become knowledgeable health care consumers		
Stanford Employee/Retiree Insider Electronic Newsletter	Feature Article: Introduction of the Educated Choices brand and magazine			Feature Article: Cancer prevention		
Stanford Report Electronic Daily Newspaper	Feature Article: Introduction of the Educated Choices brand and magazine		Feature Article: The reasons that health care costs are rising so dramatically across America and wellness efforts to slow the rise		Feature Article: What Stanford employees can do to help flatten the health care cost curve	
Surveys and Focus Groups	Online Survey: Popup survey will accompany the digital flipbook version of the Educated Choices magazine to test the relevance of the content	Online Survey: Determine overall satisfaction with health and welfare programs and preferred means of receiving information	Online Survey: Popup survey will be built into the whiteboard video to poll viewers on the effectiveness of the content	Focus Groups: Do a deep dive to determine whether we are gaining traction with the Educated Choices brand		
Twitter (@StanfordInsider)	Weekly Themed Tweets: heart health and WorkLife resources and referral	Weekly Themed Tweets: nutrition and WorkLife resources and referral	Weekly Themed Tweets: environment and WorkLife childcare	Weekly Themed Tweets: cancer prevention and WorkLife childcare	Weekly Themed Tweets: men's health and WorkLife childcare	
	Regular beat tweets by the HR Initiatives team aimed at enhancing the employee experience					

Published Content in Support of the “Educated Choices” Program

News article: “New magazine showcases Stanford benefits, resources across campus”

<https://news.stanford.edu/news/2013/february/educated-choices-magazine-021113.html>

I wrote this article for *Stanford News*, launching the “Educated Choices” newsletter, which took its name from the health care education program that I created.

News article: “Health care reform: What does the Supreme Court ruling mean to Stanford employees?”

<https://news.stanford.edu/news/2012/july/health-impact-07172012.html>

I wrote this article assessing the impact of the Supreme Court ruling upholding the Affordable Care Act.

Whiteboard video: “Stanford Employee Benefits: Making Educated Choices”

<https://www.youtube.com/watch?v=6KwwBMvig2w>

I created the concept and wrote the video script, and Towers Watson produced the video.